

Procedures for Bulk Purchases

1. Each Agency should consolidate their upcoming requirements and submit one requisition for all their desktop and laptop PC needs and one requisition for all their printer needs for the next Bulk Purchase.
2. Enter a requisition on e-Procurement for the Standard Configurations needed. Desktops, Laptops and their peripherals can be included on the same requisition. Printers and their peripherals need to be put on a separate requisition from Desktops and Laptops.
3. The Standard Configurations are available for viewing at http://www.scio.state.nc.us/sit_Initiative_ITVolumePurchasing.asp
4. There are no standard configurations for printers at this time. The printer configuration, printer manufacturer and printer model is determined by the Agency at this time.
5. Enter the total quantity of the Standard Configurations being requested.
6. If ordering desktops or laptops, use Basic Desktop, High-End Desktop, Basic Laptop, High-End Laptop, etc. for the description. No further description is necessary. The estimated pricing is listed with the Standard Configurations.
7. If ordering printers, you will need to specify the Printer manufacturer, model number, part number and price. This information can be obtained from the e-Procurement catalog, the State Term Contract 204D link or the manufacturer website. You cannot use the previous Bulk Printer Purchase price on your request; that price was valid for that Bulk Purchase only. You must use the State Term Contract 204D price.
8. Use separate lines for any peripherals needed.
 - a. Example 1 – If you are ordering fifty Basic Desktops with fifty 17 inch Flat Panel Monitors, then:
 - 1) The first line of the requisition would have Quantity: 50, Description: Basic Desktop.
 - 2) The second line of the requisition would have Quantity: 50, Description: Flat Panel Monitor, 17 inch.
 - 3) No further description is necessary.
 - b. Example 2 – If you are ordering eighty High-End Laptops and you want thirty of them to have docking packages, then:
 - 1) The first line of the requisition would have Quantity: 80, Description: High-End Laptop.
 - 2) The second line would have Quantity: 30, Description: Docking Packages.
 - 3) No further description is necessary.
 - c. Example 3 – If you are ordering five HP Laserjet 4250 Printers and you want envelope feeders with the printers, then:
 - 1) The first line of the requisition would have Quantity: 5, Description: HP Laserjet 4250 Printer, Part #Q5400A, Unit Price: \$808.95

- 2) The second line of the requisition would have Quantity: 5, Description: Envelope Feeder, 75 Sheet for the 4250, Part #Q2438B, Unit Price: \$201.53
9. After the requisition is created, it will then go through your Agency's normal Approval Flow.
10. Your Agency's IT Approver should be added to the Approval Flow before it reaches your Agency's Purchasing Department.
11. Once it reaches your Agency's Purchasing Department, they will provide a Purchasing contact name, telephone number and email address in the Comments section of the requisition.
12. Your Agency's Purchasing Department will then add Statewide IT Bulk Purchaser to the Approval Flow.
 - a. DO NOT add the Statewide IT Bulk Purchaser in parallel on the Approval Flow.
 - b. The Statewide IT Bulk Purchaser should be added BEFORE the Agency's final Purchasing Agent on the Approval Flow.
 - c. Do not add the State IT Procurement Office ID, use the Statewide IT Bulk Purchaser ID.
 - d. The Statewide IT Bulk Purchaser should never be the final approver on the Approval Flow.
13. The requisition will then be sent to the Statewide IT Bulk Purchaser in e-Procurement.
14. The requisition will be added to next Bulk Purchase bid.
15. After the Bulk Purchase bid has been awarded, the Statewide IT Bulk Purchaser will add comments to the requisition, attach the awarded bid pricing to the comments and approve the requisition back to the Agency.
16. The Agency will then change their requisition to reflect the awarded vendor and awarded pricing. You will also need to reference the awarded bid number and the appropriate State Term Contract number on the Purchase Order.
17. The quantities and configurations on your requisition will be the basis for the items specified on the Bulk Purchase. After the Bulk Purchase is awarded, they will be the quantities and configurations that will be ordered by your Agency. Failure to order the quantities and configurations you requested may result future requests being suspended.
18. Emergency / Urgent / Exception Requests
 - a. If this request is considered an Emergency/Urgent need, then state this Comment Section of the requisition
 - b. You must provide the justification why this requisition cannot wait until the next Bulk Purchase bid. Include the justification in the Comment Section of the requisition or attach the justification document to the requisition.
 - c. If this request is for desktops and/or laptops that are not Standard Configurations, then state this in the Comments Section of the requisition. Include the justification of why the Standard Configurations

will not meet the Agency's requirements or attach the justification document to the requisition.

- d. You must provide a quote from the Vendor for the equipment being requested. This quote should be attached to the requisition in the Comment Section or it can be faxed or emailed.
- e. The workflow for the Emergency / Urgent / Exception Request is as follows:
 - 1) After the requisition is created, it will then go through your Agency's normal Approval Flow.
 - 2) Your Agency's IT Approver should be added to the Approval Flow before it reaches your Agency's Purchasing Department.
 - 3) Once it reaches your Agency's Purchasing Department, they will provide a Purchasing contact name, telephone number and email address in the Comments section of the requisition.
 - 4) Attach any quotes, memorandum or supporting documentation to the Comment Section of the requisition.
 - 5) Your Agency's Purchasing Department will then add Statewide IT Bulk Purchaser to the Approval Flow.
 - 6) All Emergency/Urgent/Exception requests are reviewed and approved/disapproved by the State CIO and State Procurement Officer.
 - 7) Once a decision has been made, the requisition is returned to the Agency for processing.